#12
12/27/02
AW

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re application of: Steven R. Jenkins	§	Attorney Docket No. 8000.53.02
Serial No.: 09/419,327	§	Customer No. 27683
Filed: October 15, 1999	§	Group Art Unit: 2177
For: A WEB-ENABLED TRANSACTION AND MATTER MANAGEMENT SYSTEM	§	Examiner: Dodds, Harold E.

DECLARATION UNDER RULE 37 C.F.R. § 1.132

1. My name is James E. Melson, Jr. I am Chief Executive Officer at Domain Partners, Inc. I was Chief Executive Officer of RealPage Communications, Inc, at the time the acts described in this Declaration occurred. I was engaged as a consultant to the inventor, Steven Jenkins, in connection with development of the subject matter of the present application.

2. All acts described in this Declaration took place in the United States of America.

3. I have read and understand U.S. Patent Application Serial No. 09/419,327 to Steven Jenkins (hereinafter "Application").

4. The subject matter of the Application was disclosed to me by Steven Jenkins prior to February 3, 1998. More specifically, Steven Jenkins disclosed the subject matter of the Application to me (including specifically the subject matter of pending claim 15) in multiple meetings that occurred prior to February 3, 1998. The meetings included discussions on the development of software for the purpose of implementing the subject matter of the Application, including claim 15 as follows:

> A software program for implementing a website by which documents can be shared between a service provider and a client, the software program comprising:
>
> instructions for accessing a repository, the repository for storing a plurality of documents;
>
> a first graphical interface by which a first user associated with the service provider can log into the network application, can add one or more documents to the repository, and can assign a category, an authorization, and a matter for each document,

wherein the matter conceptually links a plurality of related documents and information associated with the matter is applicable to each of the plurality of documents;

instructions for identifying one or more clients, each client comprising one or more users having a level of authorization with respect to matters of the client;

an email interface linked to the first graphical interface, the email interface including a list of potential email recipients selected according to at least one client, the category and the matter;

a second graphical interface by which a second user associated with a client can log into the network application and can access one or more of the documents in the repository, based on the category, authorization, and matter for the one or more documents; and

instructions for allowing the second user to view, add, or modify any one of the documents in the repository according to the authorization of the second user with respect to a particular matter.

5. The discussions prior to February 3, 1998, included (but were not limited to) the concepts embodied in the design notes attached as Exhibit A. These concepts are the subject matter of the Application. For example, the concepts discussed during the meetings and embodied in the design notes correlate to claim 15 as follows:

Subject matter of claim 15	**Subject matter disclosed prior to February 3, 1998, as evidenced by subsequent design notes**
A software program for implementing a website by which documents can be shared between a service provider and a client, the software program comprising:	
instructions for accessing a repository, the repository for storing a plurality of documents;	Page 35 illustrates a plurality of documents. Page 38 illustrates a document library.
a first graphical interface by which a first user associated with the service provider	Graphical interfaces are represented throughout the design notes.
can log into the network application,	Logging into a network is inherent given the password and access

	restriction elements (see, for example, pages 41-44).
can add one or more documents to the repository,	Page 35 illustrates a plurality of documents in a graphical interface. These documents may be added by using, for example, the "Document Management" feature illustrated on page 7.
and can assign a category, an authorization, and a matter for each document,	Page 39 illustrates a "New Project Wizard", pages 42-44 illustrate a "New Client Wizard", and page 35 illustrates a plurality of documents. These illustrate embodiments of a category, an authorization, and a matter, respectively.
wherein the matter conceptually links a plurality of related documents and information associated with the matter is applicable to each of the plurality of documents;	Page 35 illustrates such "linked" documents.
instructions for identifying one or more clients, each client comprising one or more users having a level of authorization with respect to matters of the client;	Pages 42-44 illustrate a "New Client Wizard" where users are associated with levels of authorization with respect to client matters.
an email interface linked to the first graphical interface, the email interface including a list of potential email recipients selected according to at least one client, the category and the matter;	Page 23 illustrates an email interface that satisfies these elements.
a second graphical interface by which a second user associated with a client can log into the network application and can access one or more of the documents in the repository, based on the category, authorization, and matter for the one or more documents; and instructions for allowing the second user to view, add, or modify any one of the documents in the repository according to the authorization of the second user with respect to a particular matter.	These elements are satisfied as described on pages 7, 23, 35, 38, 39, 41-44.

5. Because of my meetings with Steven Jenkins prior to February 3, 1998, and the concepts discussed during those meetings, I believe that the subject matter of the Application was invented by Steven Jenkins prior to February 3, 1998.

I acknowledge that willful false statements are punishable by fine or imprisonment, or both, under 18 U.S.C. § 1001, and may jeopardize the validity of this application or any patent issuing from it. I declare under penalty of perjury under the laws of the United States that all statements made of my own knowledge are true and that all statements made on information and belief are believed to be true.

James E. Melson, Jr.

James E. Melson, Jr.

12/9/02

Date

r-36059.1

Exhibit A

ns

HIGHLIGHTING KEYS

set; non-variable

variable; determined by choices in New Client Wizard

variable; determined by choices in New Project Wizard

Data Input

Reports only; data previously input

Column Key

CLIENT CONNECT
Specific Keys

- **Storefront**
  - Links to specific areas direct paths
  - Return to Storefront
  - Division / All Projects / Project Approach
  - Navigation Tools

- **Transaction Management**
  - Status
    - Method for Most Current? Multiple Party Input last edit time & date stamp by person?
  - Issues
    - Template List of Categories of Issues / Client
    - "Hot" Issues flag
    - Responsibilities
    - Discuss
    - Collapsible for Concurrent Text
  - Critical Dates
    - Template List of Critical Dates / Client
  - Checklists
    - Specific Checklists / Templates for Client
  - Action
    - Report Accessible by Each Person
  - Working Group
    - Input Form
    - Auto Assign to "WG #s"

- **WG #s**
  - Horizontal -- 1 line -- Format

- **E-mail**
  - Easy Access
  - Auto setup -- From
    Re -- Client Connect [category]
    Date
  - To; CC; BC -- Pop-up Address Lists
    Internal Distribution
    Distribution Lists
    set up default distribution per screen
  - "Copy" Issue ?

- **Transaction Management Reports**
  - Each "Standard" Report Customizable on Spot pop-up variable
  - Data Input in Reports ✓
  - Context Must Show ✓
  - All Projects or Selected (1 or more) Projects ✓

• Status Report	- Method for Most Current ✓ multp. people time/date stamp
• "Hot" Issues Report	- Customizable for All or Outstanding Only
• Issues Report	- Customizable for All or Outstanding Only
• Critical Dates Report	- Customizable for Period
• Checklist Report	- Customizable for All or Outstanding Only
• ~~Active~~ Action Report	- Customizable for All or Outstanding Only - Customizable for Each ~~Active~~ Action Party
• Responsibility Report	- Customizable for All or Outstanding Only - Customizable for Responsible Party
• Discussion Report	- Customizable for All or Outstanding Only - Customizable for Discussion Party
• Custom Thelen review & give ideas	- Multiple Options
• Projects Report	- Columns Per Report - All Reports automatically for that project
• Document Management	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item
• Counsel Information	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item
• Client Information	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item
• Library	- From WP or Acrobat (scanned) - Description by Attorney / Client / Staff - Searchable by WP or Acrobat - Links to actual document or item

CLIENT CONNECT
General Keys

- 2-Way Input / Password Limited yes
- Input in Both Transaction Management and Transaction Management Reports JM will check
- Input and/or Reports for Attorneys on Multiple Clients "Files" button — yes
- Division / All Projects / Projects Approach JM will check — think OK
- Storefront / Return to Storefront yes
- Navigation Tools: Return to Storefront
  on all pages
  Working Group #s
  E-mail
  Files (for Attorneys Only)
  all OK
- Data Input: Method HTML – OK
- Wizards: New Client -- for setup of new client
  New Project -- for setup of new project
  Data Input -- for data input non issue - HTML direct input
  Password -- for password administration
  "intelligent"
- Context: e.g., "Project, City, State" throughout
  Issues Category
  Specific Transaction Management--e.g., Critical Dates/Action/etc.
- Reports: Variations of ~~Customizable in~~ Each "Standard" Report
- Archive: When Complete Project
- Data or File Limits no issues
- *Data Input: In Views for Easy Access HTML - OK
- Password: Limitations / Keys later, major discussion

COLLABRANET

General Keys

- Input and/or Reports on Multiple Clients

ClientConnect – Client Storefront

JM - default to division or last one?

To permit mult-division access eg Arcadian Dispositions Acquisition Litigation

Client Connect - Client

Division ☐ All Projects ○ Project ☐

<u>Transaction Management</u>

- <u>Status</u>
- <u>Issues</u>
- <u>Critical Dates</u>
- <u>Checklists</u>
- <u>Action</u>
- <u>Working Group</u>

<u>Document Management</u>

<u>Counsel Information</u>

<u>Client Information</u>

<u>Library</u>

<u>TM Reports</u>

- <u>Status Report</u>
- <u>~~Hot~~ Issues Report</u>
- <u>Issues Report</u>
- <u>Critical Dates Report</u>
- <u>Checklist Report</u>
- <u>Action Report</u>
- <u>Responsibility Report</u>
- <u>Discussion Report</u>
- <u>Project Reports</u>
- <u>Custom Reports</u>

<u>Data Input</u>

☐ Storefront ☐ Working Group #A ☐ E-Mail Files ☐

Note: Navigation tools could be at side

Storefront Button

File Button
- to access other files eg Archive
  - PRT
  - TW
  - HB
  - SEC
- opens storefront page for applicable file
- Counsel Query

INTEGRATION OF DATABASES

COLLABRANET STOREFRONT

COLLABRANET - HAYNES AND BOONE, L.L.P.   STEVEN R. JENKINS

☐ STOREFRONT   ☐ E-MAIL

By ATTORNEY   ALL ACTION ITEMS by Client / PROJECT   + Action Button

Better if goes to calendar [illegible]

Firm Intranet / Links & Client Channel

PRACTICE MANAGEMENT
- Calendar
- Phonebook
- Lobby Log
- Time Entry
- C/M List
- Docs Open
- To Do

Firm
- HB Apps
- Phonebooks — Firm
- Clients
- BOD
- Library — (CDR)
- Dunst Library

TRANSACTION/MATTER Mgt
- C/M Info
- TM Standalone
- Client Contact

Key = relate to individual calendar

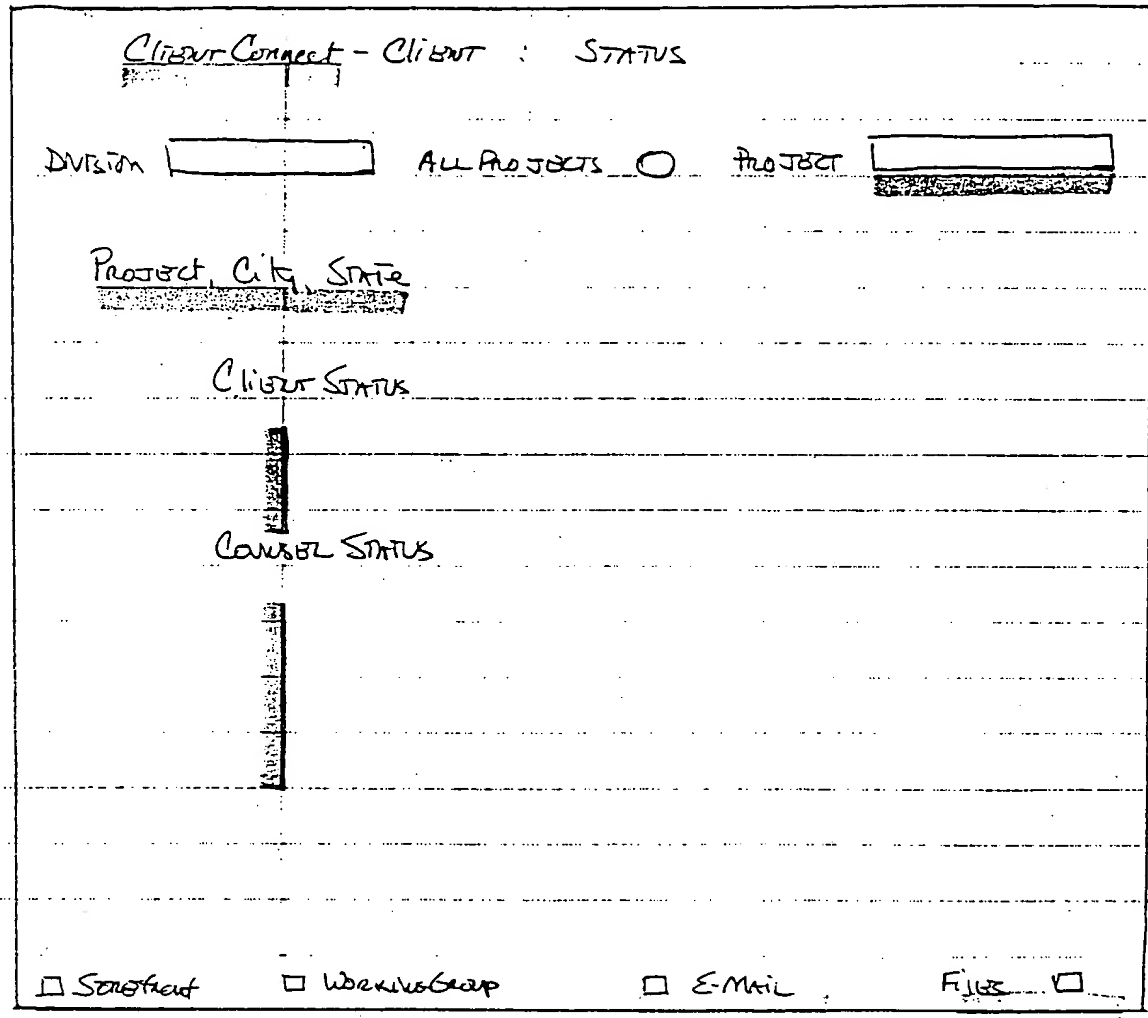
Communication

Client Mgt
- C/M info
- New client/matter up
- AR/Billing — Elite
- Conflicts

Depts
- Doc Library
- Research

Client Dev
- Current
- Dept
- Firm
- Presentations
- BD Dlvr...

Communication
- E Mail
- Remote Access
- Client Link



RP- method f
determining late

Also - "Last Edit Date"

ALL Pr[illegible]cts

Status

for filter

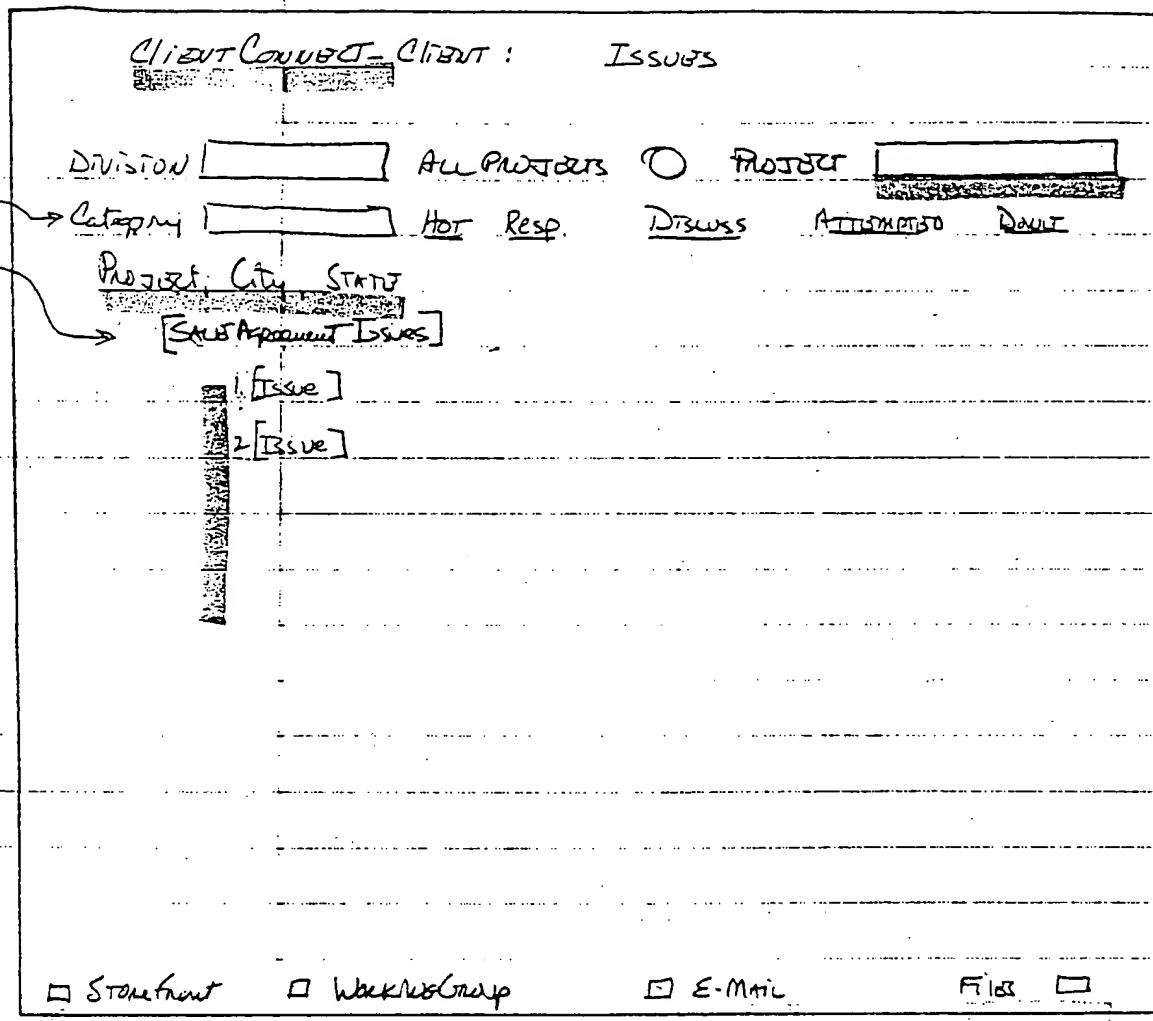
~ for auto assign rules

Status	Done
Project → 52 & 56 Roland St., Charlestown, MA	
A. Weekly Status Report	
Weekly Report → 1. **Week of 1/5/98:** Inspection Period extended until 1/15/98; Closing scheduled for 2/6/98; Buyer still assessing certain environmental matters.	

Purpose: to view weekly status reports by project; uses filter to "hide" prior reports; for clients' convenience, uses filter to limit view to only most current

Expand to include client [illegible]

Categories =
ALL or
Specified Variables



Sales - Create
List of
Issues
Categories

ALL PROJEC

for filter

Issues

~ for autoassign rule

	Resp.	Discuss	Attempted	Done	Date
Issues					
PROJ → o 52 & 56 Roland St., Charlestown, MA					
A. o Issues Checklist (~)					
Bold = template 1. o **Input/ Initial Drafting Issues (List):**					
2. o **Local Counsel Issues (List):**					
3. o **Sale Agreement Issues (List):**					
a. o Section 3.2(a) & 3.9(a) – Brady wants rep from Seller that Seller hasn't received written notices from the govt. as to non-compliance with applicable laws, regulations, etc.					
b. o Section 3.3(b) – Brady wants Purchaser's liability limited to "negligence in conducting inspections or tests" rather that simply any claims "arising out of Purchaser's inspections or tests"					
c. o Section 3.6(a) – Brady wants to state that Purchaser will give Seller copies of reports, tests, etc. only if Purchaser does not close. He also wants Seller to pay for 1/2 of the cost thereof if Purchaser does not close.					
4. o **Title/ Survey Issues (List):**					
5. o **Inspection Period Issues (Purchaser Identified) (List):**					
6. o **Closing Issues (List):**					

Purpose. to input and view outstanding issues by Project / type of issues;
for clients' convience, uses filter to limit view to only outstanding issues

Columns in this view and other views serve specific purposes:

- Resp.: person responsible for issue (POP UP – to assign responsibility)
- Discuss: identity of person to discuss issue with (POPUP – to assign to individual)
  Note: assignments are shown in "Discussion View" sorted by Project
- Attempted: "attempted" to discuss (✓ column)
- Done: date stamp (for hide done filter)

Suggested Improvement:

- create new view for "Hot Issues" to put limited number of genuinely key (ie. "deal buster" issues) in front of senior Management

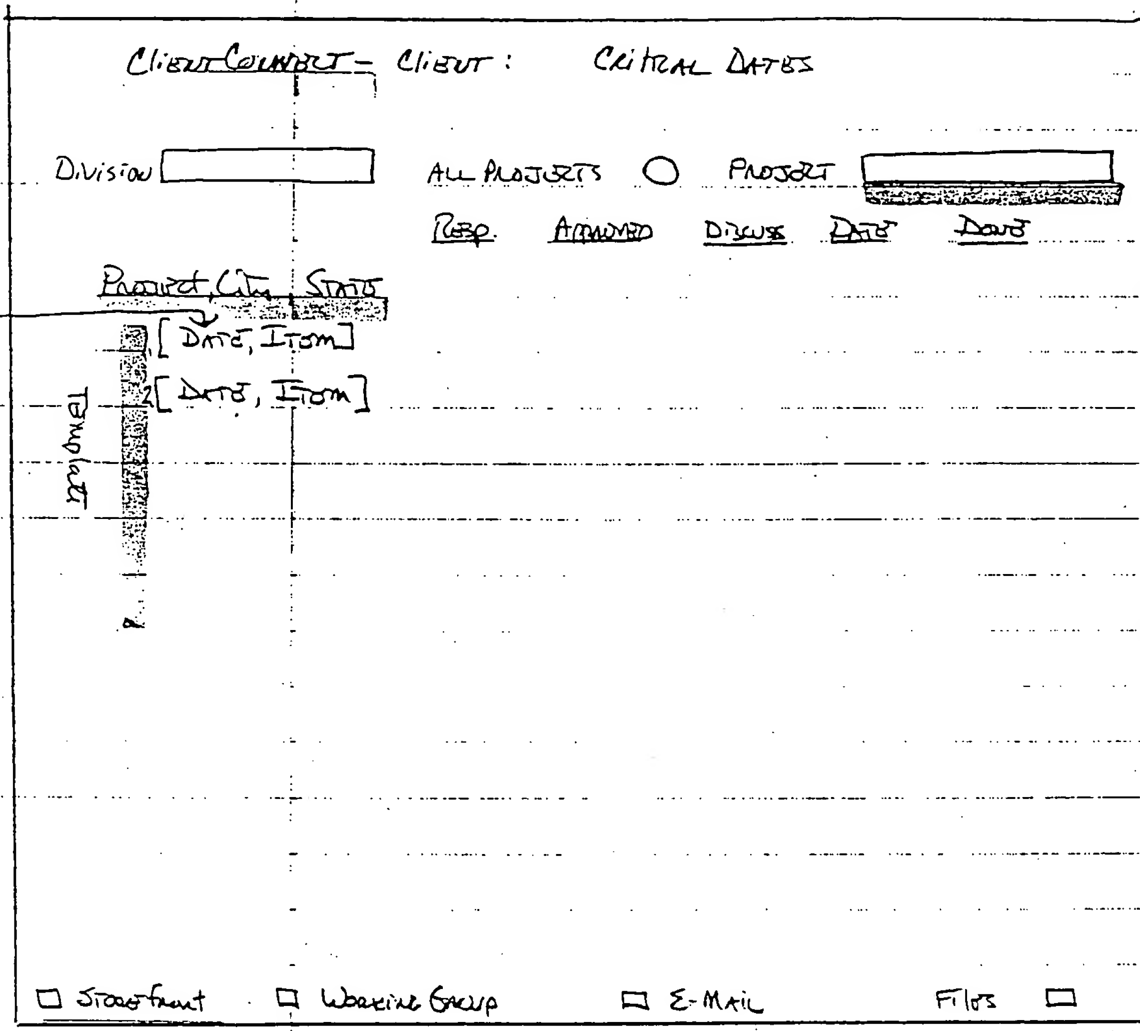
Template   Proje[illegible]nd All Projects

Hidden Column for "Master Calendar"

Critical Dates

	Resp.	Approved	Discuss	Date	Done	Check	Critical Dates
Critical Dates~							
52 & 56 Roland St , Charlestown MA							
A. Sale Agreement Summary~							
1. Critical Dates Summary and Checklist~							
a. Roland St. - Effective Date (Section 10.3): ________, 19__ (date on which the Title Company executes the Joinder of Title Company following the execution by both Purchaser and Seller)							
b. Roland St. - Deposit of Initial Earnest Money (Section 2.2(a)): ________, 19__ (within one business day after the Title Company has received a copy of the Agreement executed by both Seller and Purchaser); note: Purchaser also to deposit with Seller $100 Independent Consideration							
c. Roland St. - Deposit of Additional Earnest Money (Section 2.2(a)): ________, 19__ (within one business day after the expiration of the Purchaser's Inspection Period)							
d. Roland St. - Availability of Due Diigence Documents (if date applicable, Section __): ________, 19__ (__ days after Effective Date)							
e. Roland St. - Title Commitment/ Title Documents (Section 5.1): ________, 19__ (__ days after Effective Date)							
f. Roland St. - Survey (Section 4.1): ________, 19__ (__ days after the Effective Date); note: Agreement does not specify exact date for delivery							

JM – need pop up for date selection



RP – for composite calendar – must insert Project Name & each item

Critical Dates

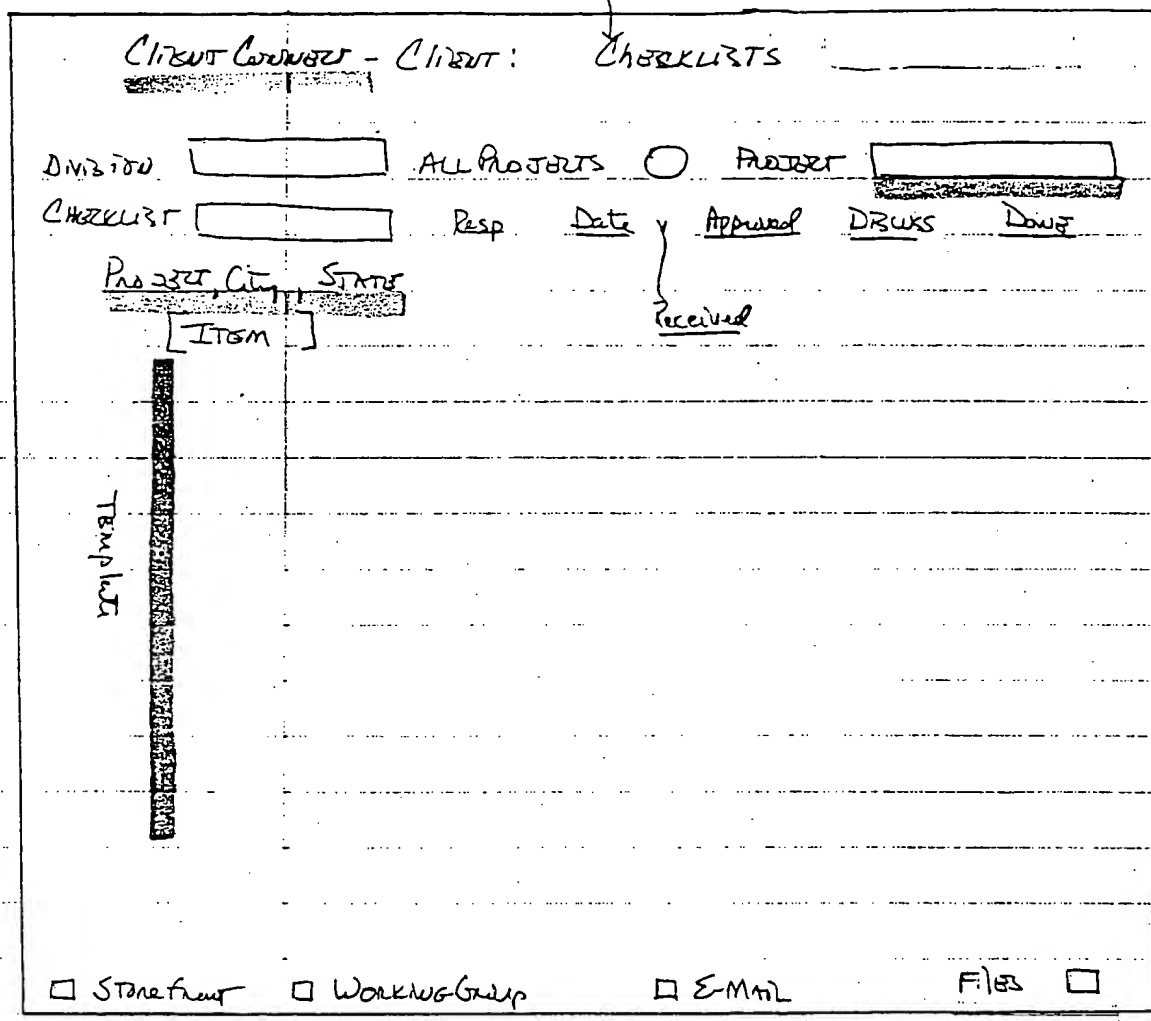
		Resp.	Approved	Discuss	Date	Done Check	Critical Dates
m.	❑ Roland St. - Special Dates:						
n.	❑ Last Edit Date: / / ( )						

Purpose: to track Critical Dates by Project and date item

to create "Master" Calendar of Critical Dates for all Projects

Note: Wizard Variable
eg "Closing Checklist"
or "Due Diligence Checklist"

SRT - Create alternate checklists



Template

PROJECT

Checkmark or date without filter

Due Diligence

	Resp.	Date	Approved	Discuss	Done Check
Due Diligence					
ZCT → ▫ 52 & 56 Roland St., Charlestown, MA					
A. ▫ Due Diligence Checklist~					
1. ▫ Seller's Deliveries:					
a. ▫ Title Information					
1. ▫ Survey					
2. ▫ Title Commitment					
3. ▫ Title Documents (Exceptions)					
b. ▫ Property Information					
1. ▫ Environmental Reports					
2. ▫ Assessments					
3. ▫ Ad Valorem and Personal Property Tax Bills					
4. ▫ Notices or Correspondence from Governmental Entities					
5. ▫ Rent Roll					
6. ▫ Monthly Operating Statements					
7. ▫ Certificate(s) of Occupancy					
8. ▫ Plans and Specifications					
9. ▫ Service Contracts					
10. ▫ Summary of Operating Expenditures					
11. ▫ Licenses					
12. ▫ Pending Litigation					
13. ▫ Leases (for non multi-family)					
14. ▫ Other Documents or Information					
c. ▫ Other Information					

PURPOSE: 2-way checklist for closing

No filter - Always view entire checklist

Template Project

Closing

Checkmark or date (without filter)

	Resp.	Date	Approved	Discuss	Done	Check
Closing						
→ Project ▫ 52 & 56 Roland St., Charlestown, MA						
A. ▫ Closing Checklist~						
1. ▫ Seller's Deliveries (Section 7.2 (a)):						
a. ▫ Deed						
b. ▫ Bill of Sale, Assignment and Assumption- Exhibit C						
c. ▫ Seller's FIRPTA Affidavit						
d. ▫ Owner's Title Policy						
e. ▫ Closing Statement						
f. ▫ Evidence of Authority						
g. ▫ Original Leases						
h. ▫ Assumed Contracts						
i. ▫ Other Documents Required by Sale Agreement or by the Title Company						
j. ▫ Tenant Estoppel Certificates						
k. ▫ Other Documents Identified During Due Diligence Process or by Agreement of Parties						
2. ▫ Purchaser's Deliveries (Section 7.2 (b)):						
a. ▫ Purchase Price, plus or minus prorations						
b. ▫ Bill of Sale, Assignment and Assumption- Exhibit C						
c. ▫ Closing Statement						
d. ▫ Evidence of Authority						
e. ▫ Other Documents Required by Sale Agreement, Seller or by the Title Company						
f. ▫ Other Documents Identified During Due Diligence Process or by Agreement of Parties						

Purpose: 2-way checklist for closing

No filter - Always view entire checklist

Date

Client Connect - Client   Action

Action Party = ALL Client / Counsel INDIVIDUALS

DIVISION [ ]   ALL PROJECTS ○   PROJECT [ ]

Action Party [ ]   Resp.   Discuss   Attempted   Done

Project, City, State

[Action Party
Eg. HB - Jenkins]

1. [Action Item]
2. [Action Item]

☐ Storefront   ☐ WorkingGroup   ☐ E-Mail   Files ☐

RP—
cross Data
to CN?

Resp / Discuss

WORKING ~~Setup Info~~ GROUP

Resp / Discuss

Name	Company	Role	Resp. / Discuss	Mailing	Tel

SJT - Define Field

Counsel: SJT

H+B

901 Main St. Suite 3100

Dallas Tx 75202

~~[illegible]@[illegible]~~

(o) 214-657-5263

(h)

(m)

(F)

(E)

WP System

WG #1

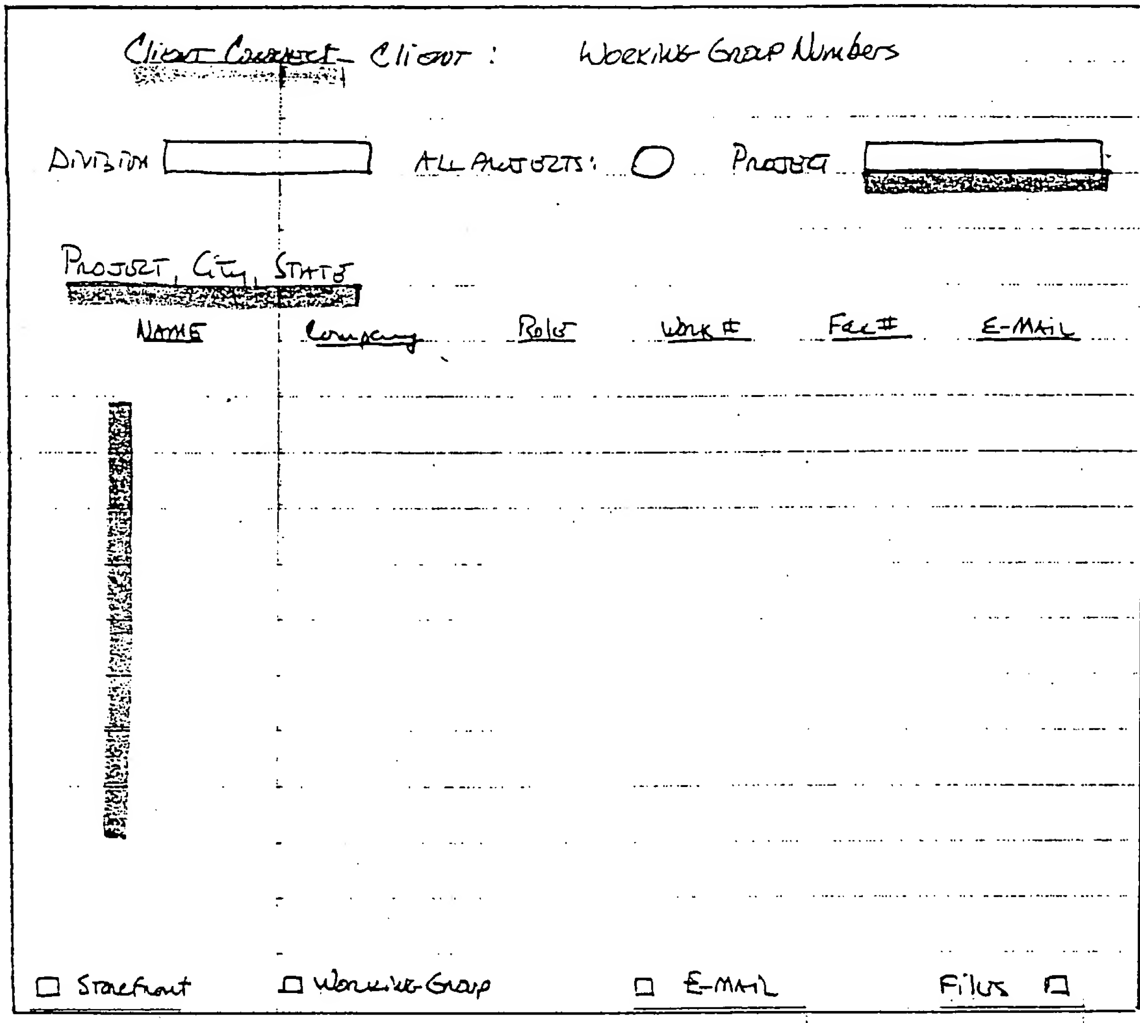
RP - input suggestions

WG #2

Project

Name	Company	Role	Telephone	Fax	E-Mail
Jenkins Steven R	H+B	Counsel			

NOTE: if "WorkingGroup" is selected in NewClient WIZARD, then "Working Group #s" should be automatically generated and "Working Group #" button should appear at bottom of all screens



Client Connect - Client   E-Mail

RP – descr capabilities

Address –
Names
Interim Group
Distribution Group

Auto: user

Auto: default
option: user specified

To: cc: bc:

From: [User]

Date:

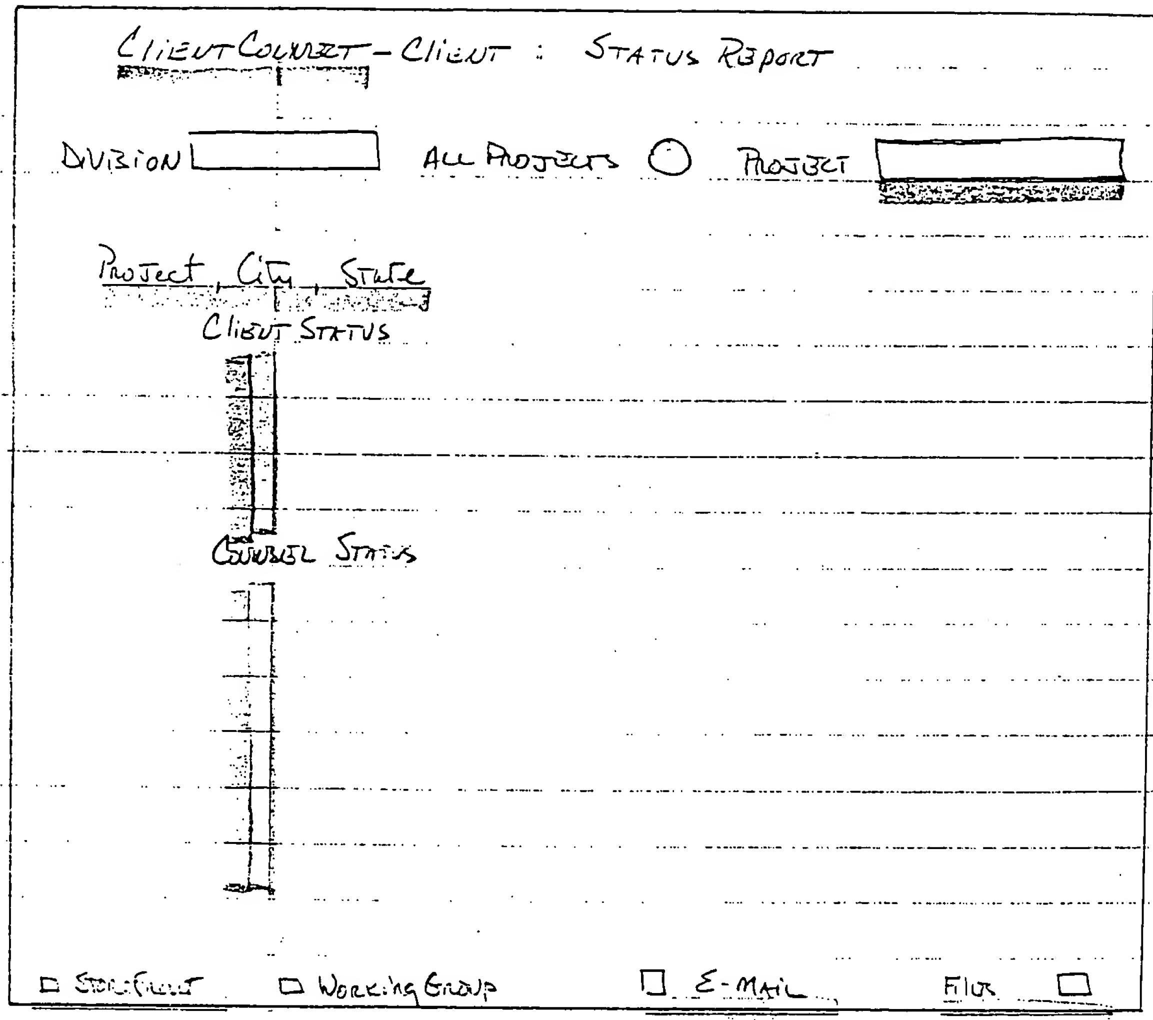
Re: Client Connect: Transaction Management - Issues

Project, Cty, State

RP – ability to "obtain" E-Mails

Purpose:

Client/local response



Discuss how determine "Most Recent" and "Last Edit Date"

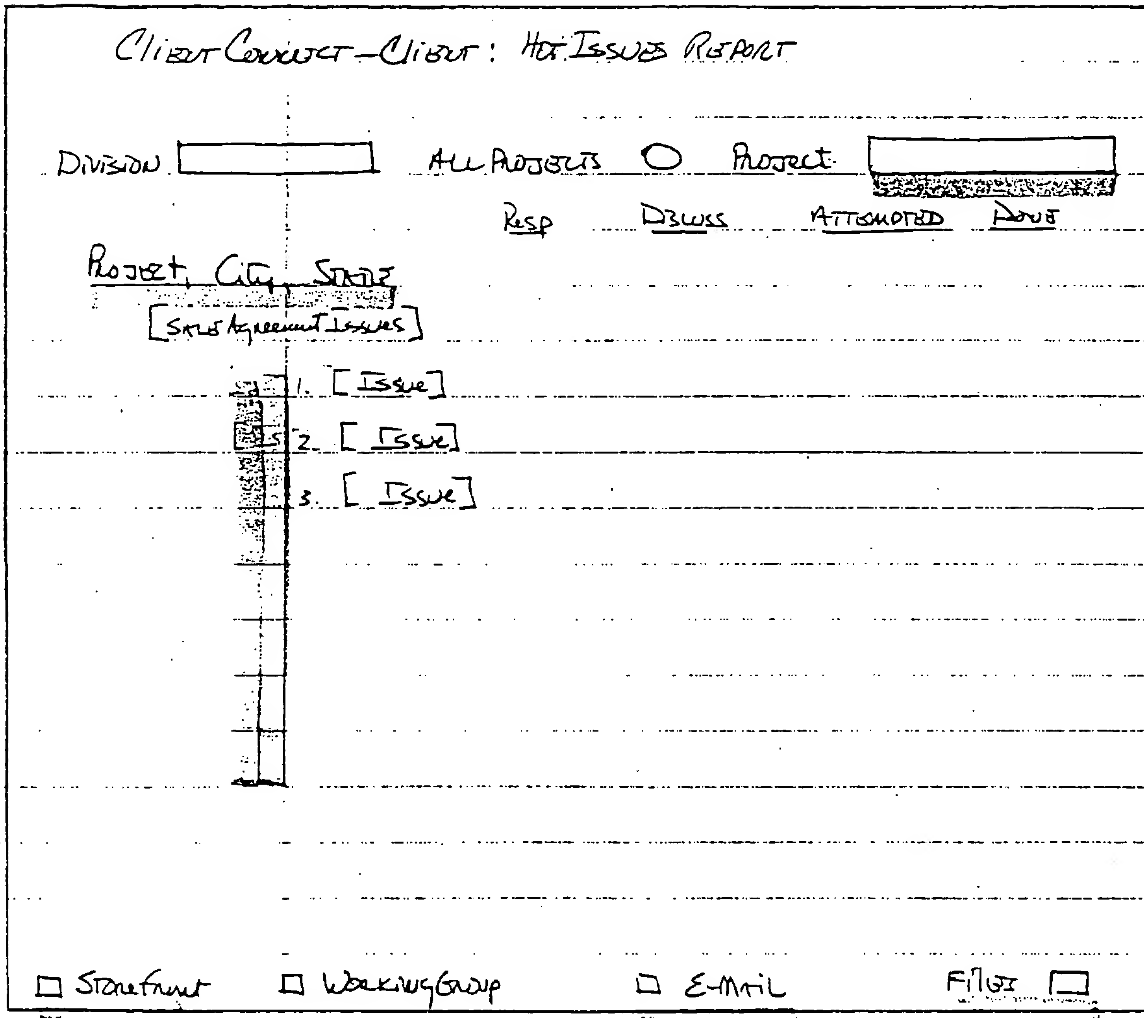
Purpose : quick, Thumbnail status report from client and counsel

Show most recent - until changed

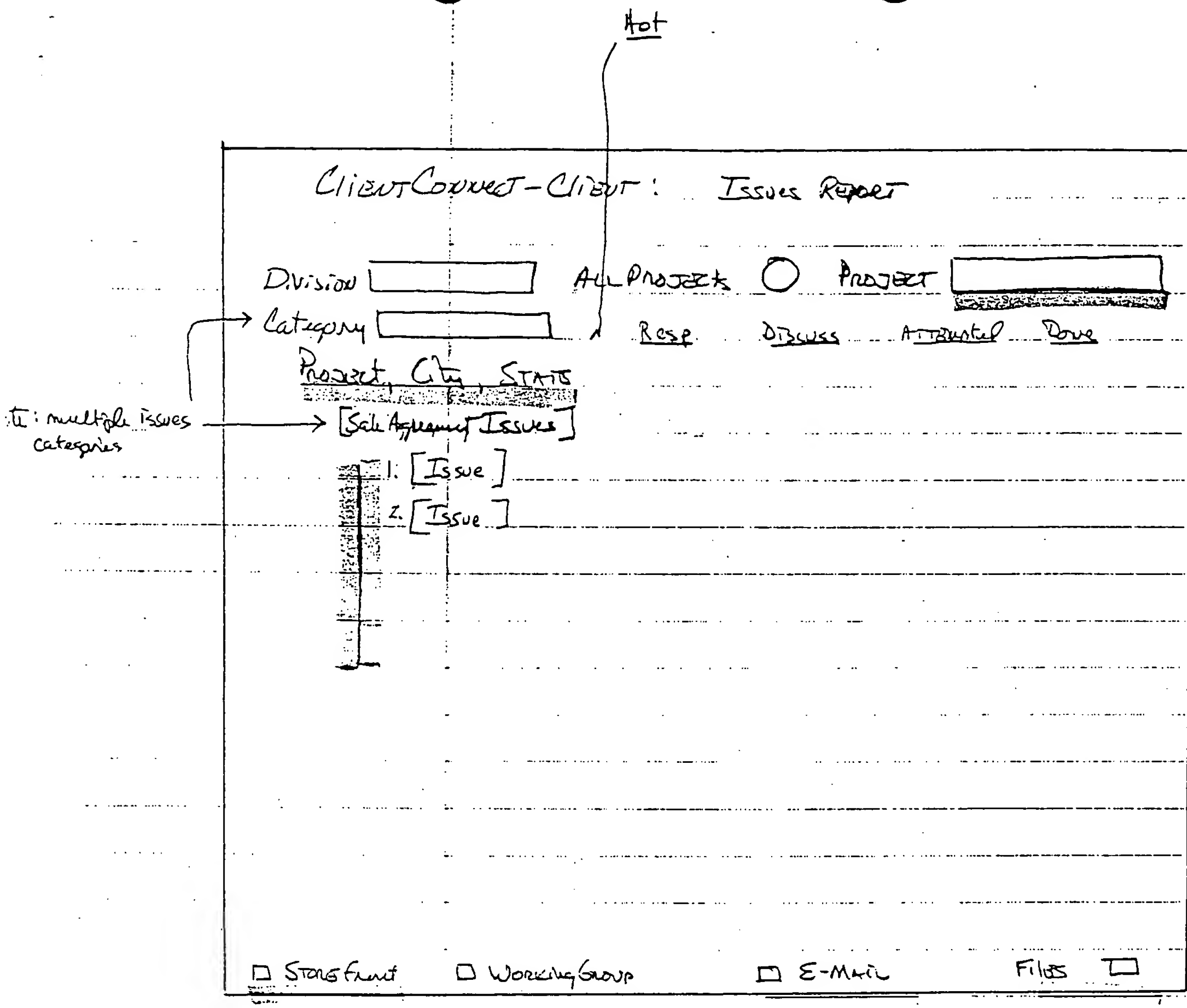
Input : Counsel/Staff - into TM Status

Links : None

Relationship

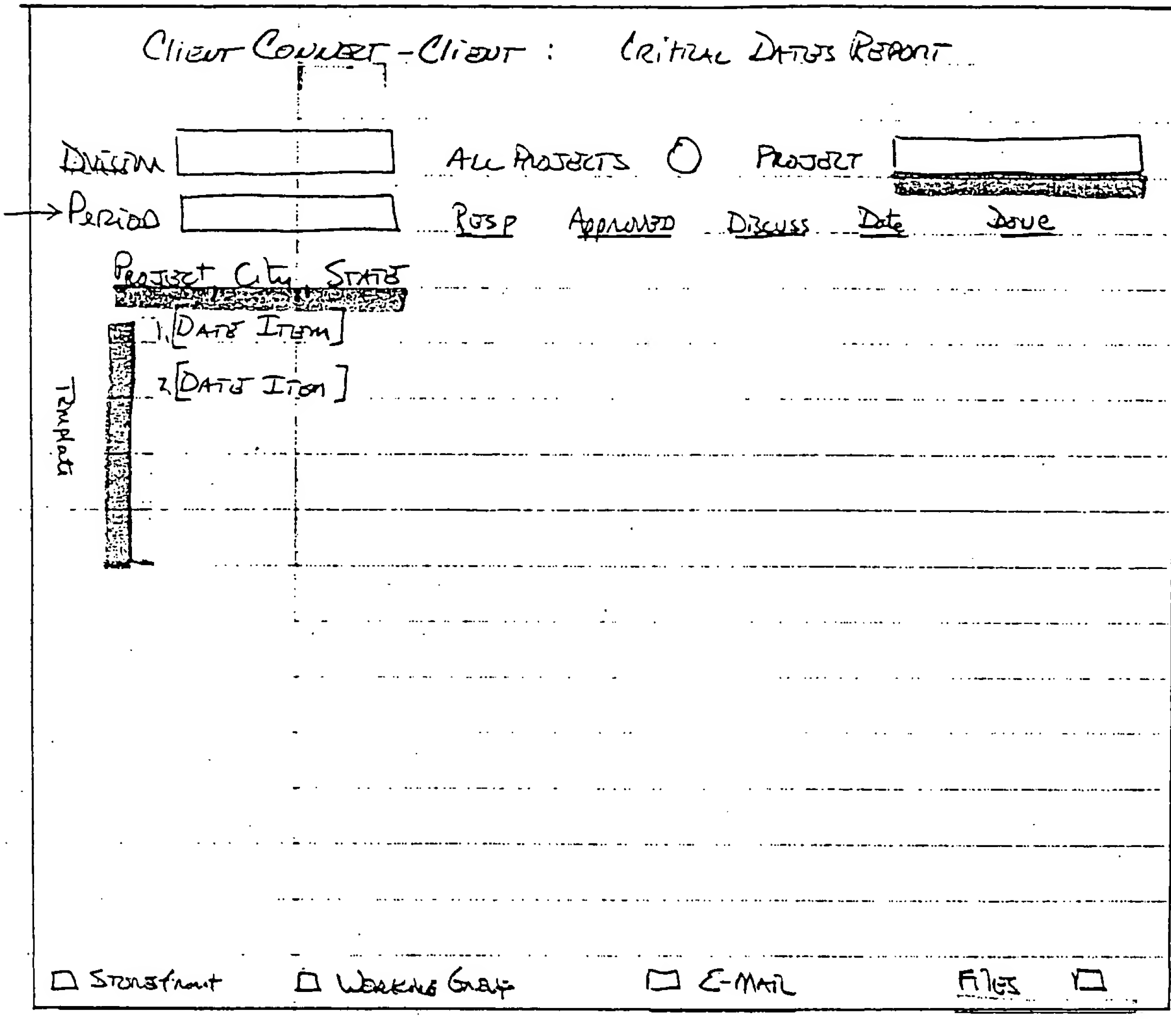


Purpose: show all outstanding "Hot" Issues
sorted by Project / Area (eg Issues, Critical Dates)



Purpose: show all outstanding "Issues"
sorted by Issue Category

efault to
ext 15 days
ll options 30
45
60
90



Leave "Done" column for input in the view

Purpose: show items per Critical Dates to be completed in next period — 15 days by default

Note: Wizard Variable
eg "Closing Checklist Report" or
"Due Diligence Checklist Report"

Note: Default to
OUTSTANDING
Custom for ALL

Separate
Report for
each checklist

CLIENT CONTACT - CLIENT: CHECKLIST REPORT

DIVISION [ ] ALL PROJECTS O PROJECT [ ]

Option =
ALL ITEMS
or Incomplete ITEMS

ITEMS [ ] Resp Date Approved Discuss Done

Received

PROJECT, City, State

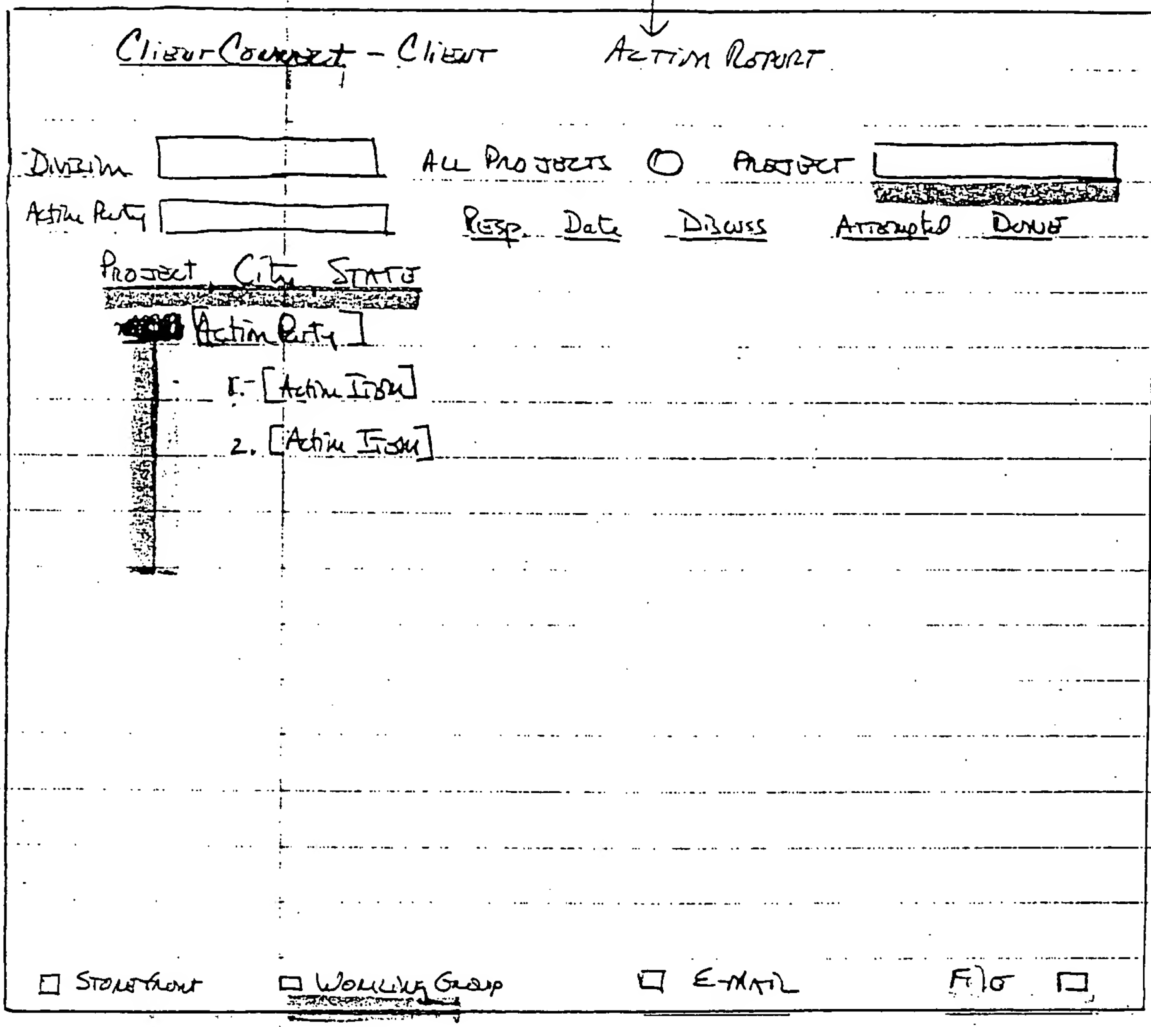
[CHECKLIST]

TEMPLATE

☐ StoreFront ☐ WorkingGroup ☐ E-MAIL File ☐

Purpose: to show OUTSTANDING checklist items by default

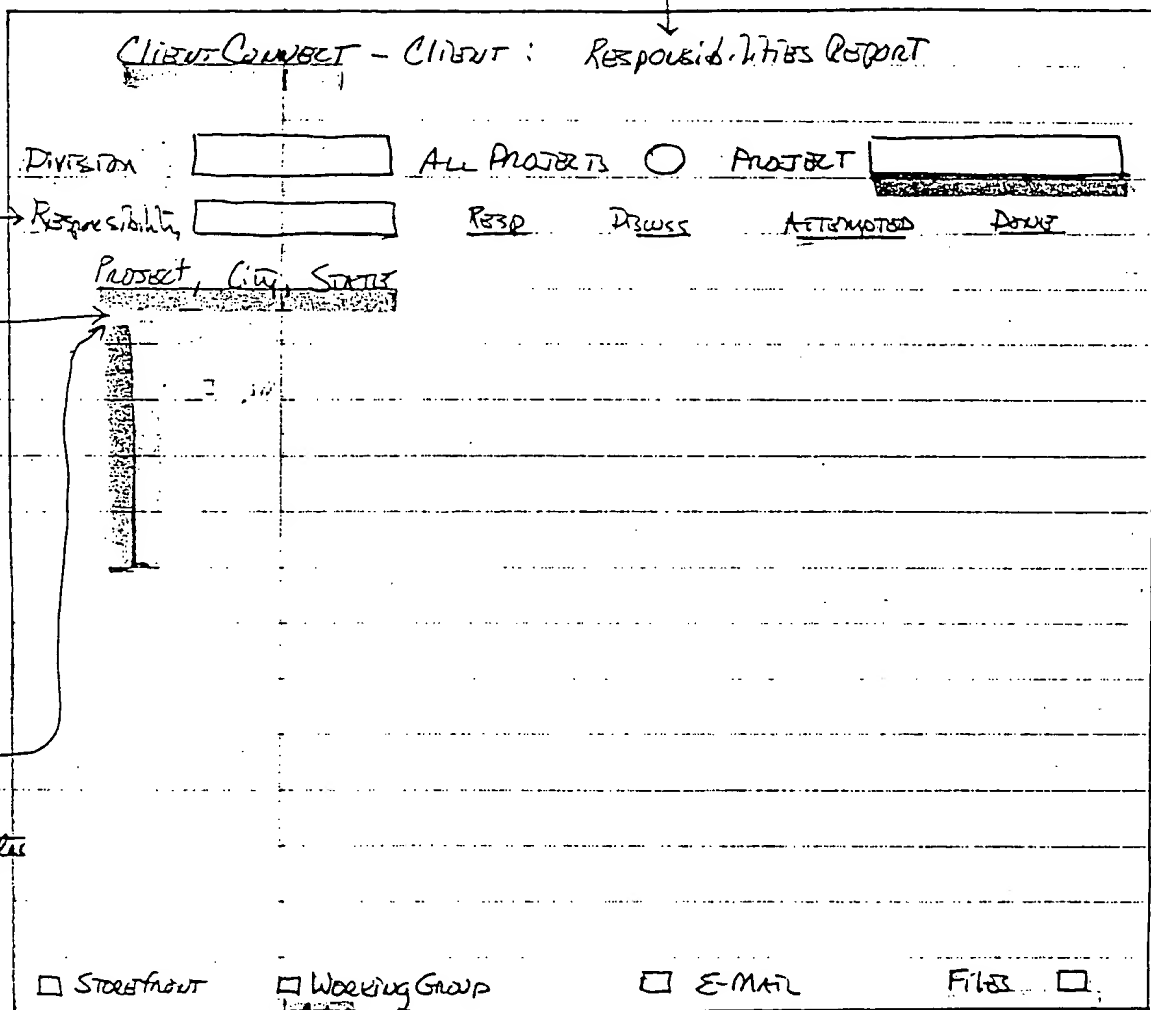
NOTE: Default to OUTSTANDING
Custom to ALL



Purpose: to show outstanding Action Items by Action Party

NOTE: Default to Outstanding Responsibility Items

Custom for ALL ITEMS



Options: ALL or Individuals

IF "ALL" — then show each "name" as content, then list Responsibility Items

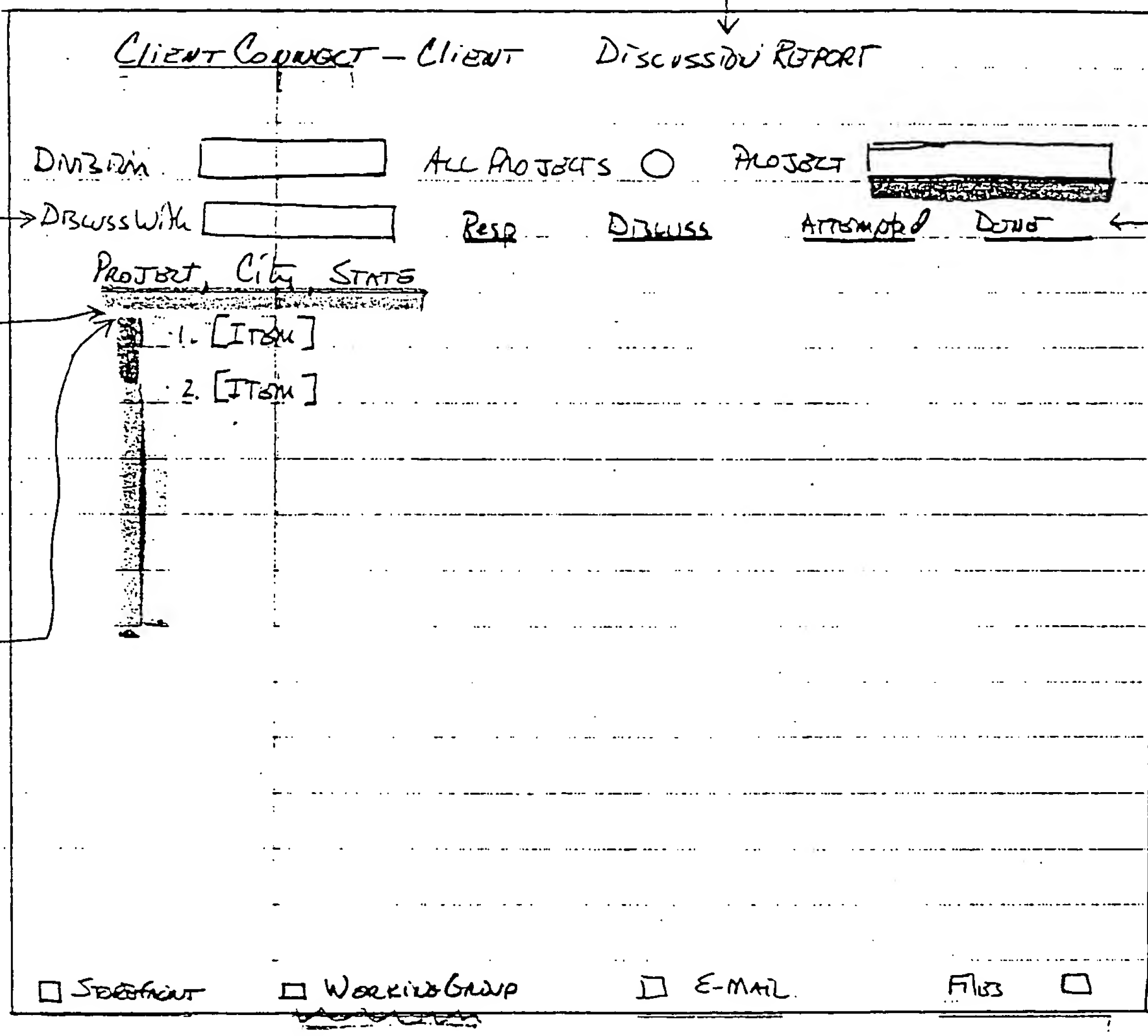
JM - can we set default to "user" based on password? or default to last specified?

Content - eg
Issues
Critical Dates
Checklist

Purpose: to show outstanding responsibility items by Responsibility Party

Note: fault to OUTSTANDING DISCUSSION ITEMS

CUSTOM REPORT FOR ALL ITEMS



options: ALL INDIVIDUALS

Note: leave "Done" column for input in this view

If "ALL" – then show each "name" then Discussion items

JM – can we set default to "user" based on password?

Content – eg
Issues
Critical Dates
Checklist

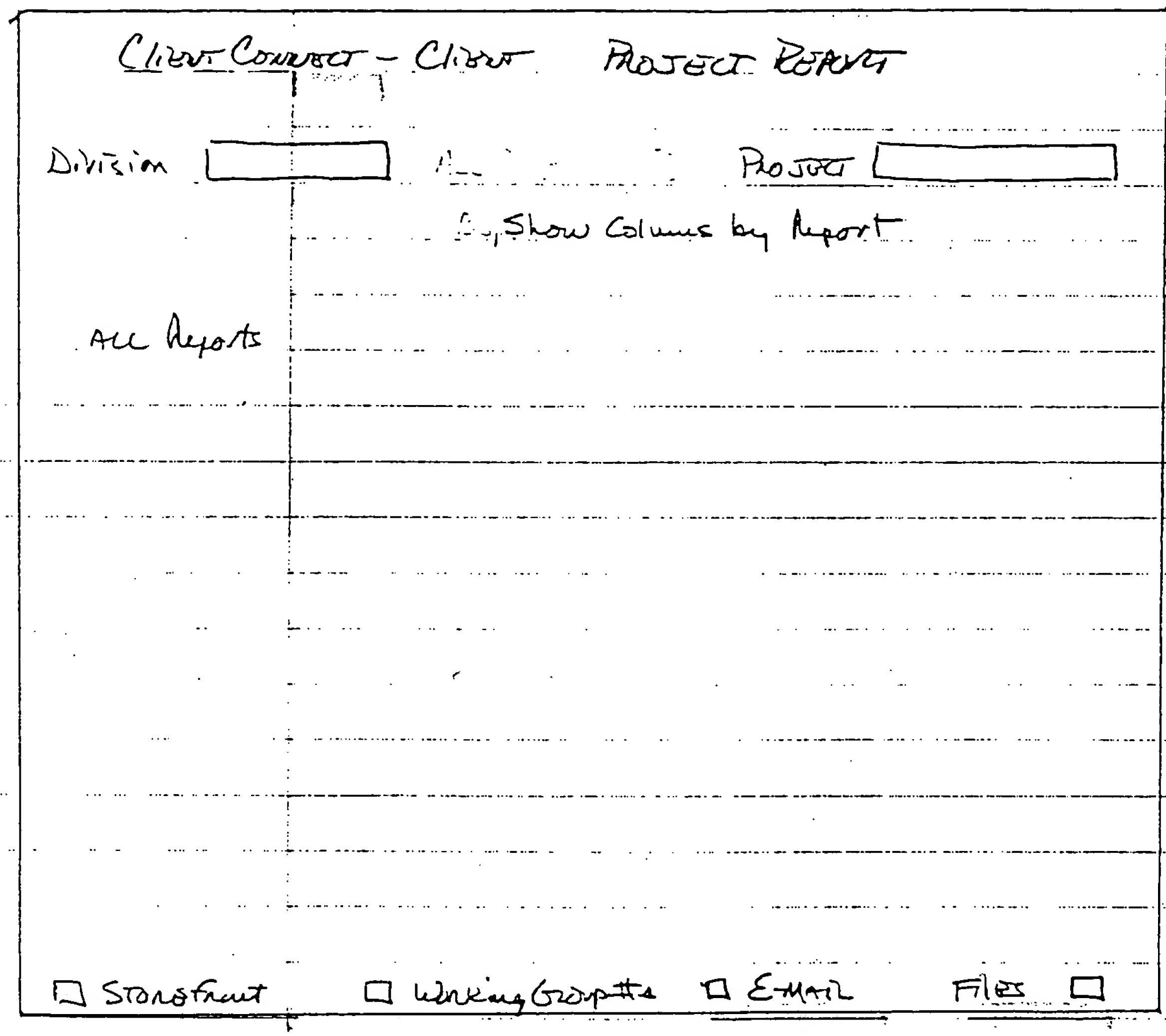
Purpose: to show OUTSTANDING DISCUSSION ITEMS by DISCUSSION Party

Discussion Report SAmple

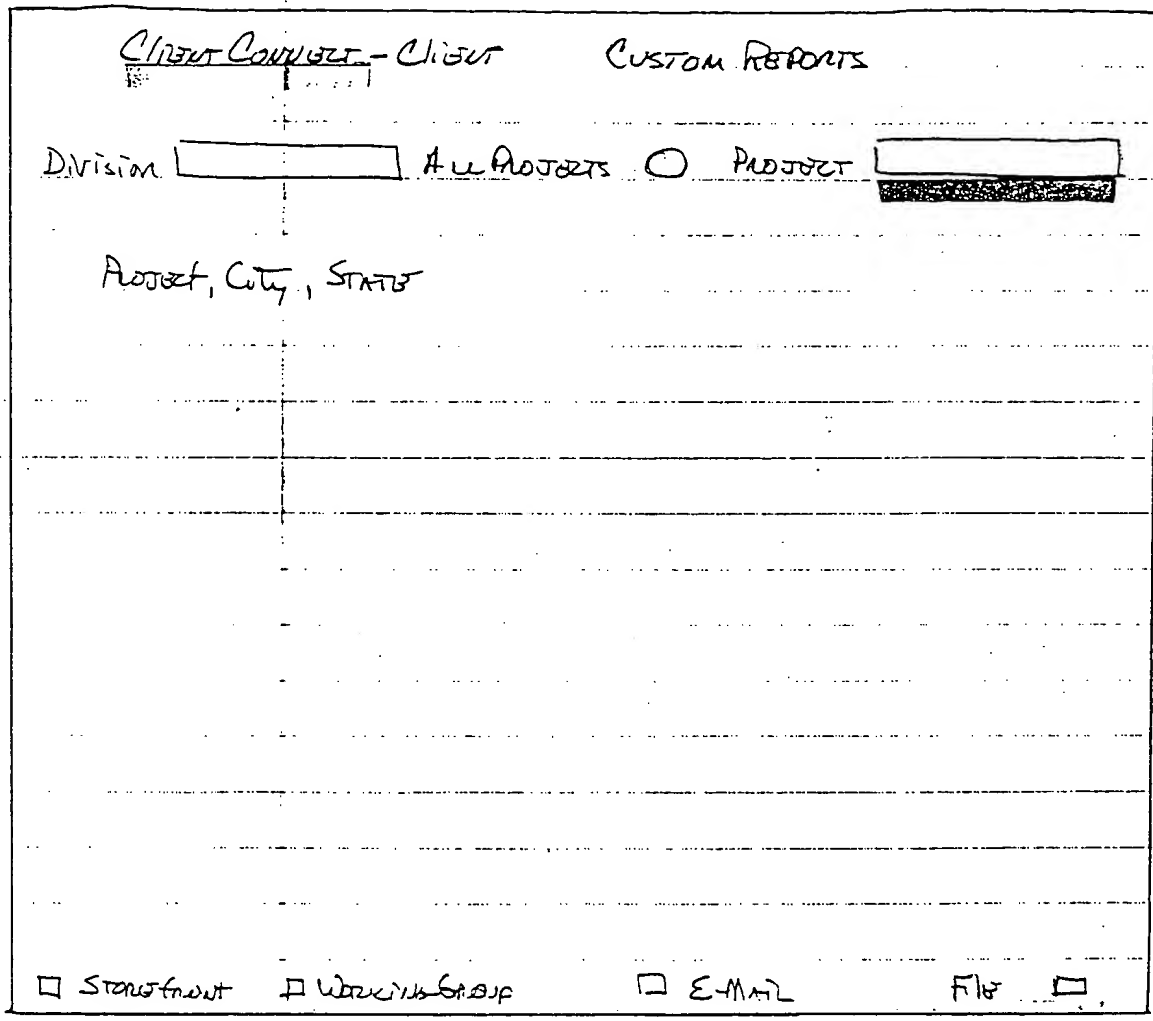
	Resp.	Attempted	Discuss	Done
A-Huff				
A-Harris				
A-Johnson				
A-Barger				
52 & 56 Roland St., Charlestown, MA				
A. Issues Checklist				
1. Sale Agreement Issues (List):				
a. Section 3.2(a) & 3.9(a) – Brady wants rep from Seller that Seller hasn't received written notices from the govt. as to non-compliance with applicable laws, regulations, etc.	A-Huff		A-Barger	
HB-Jenkins				
HB-Lowry				
HB-Raines				
HB-Hucknall				
HB-Melton				
HB-Miller				
HB-Wilkinson				
Loc. Counsel				
Purchaser				
P's Counsel				
Title Company				

Purpose: to view issues that relate to a specific person – viewed by Project Assigned by "Discuss" Column

Printed 9:50p 2/16/98


Client Connect – Client PROJECT REPORT
Division
PROJECT
Show Columns by Report
All Reports
Storefront
Working Groups
E-MAIL
Files

Discuss
Custom
Reports



Client Connect - Client: Document Management

DIVISION [ ] ALL PROJECTS ◯ PROJECT [ ]

Project, City, State

Document A [e.g. Sale Agreement]
- Draft #1, dated _/_/_
- Draft #2, dated _/_/_
- Comments, dated _/_/_ [description; eg. Buyer's Comments]

Document B
- Draft #1, dated _/_/_
- Execution Form, dated _/_/_

Letters

Memos

☐ Storefront ☐ Working Group ☐ E-Mail Files ☐

- Clicking links to Document
- Secretarial Input

Consider LAO to "Issues"

Purpose: Counsel Generated documents
Share, especially Redlined versions
Client can view/print

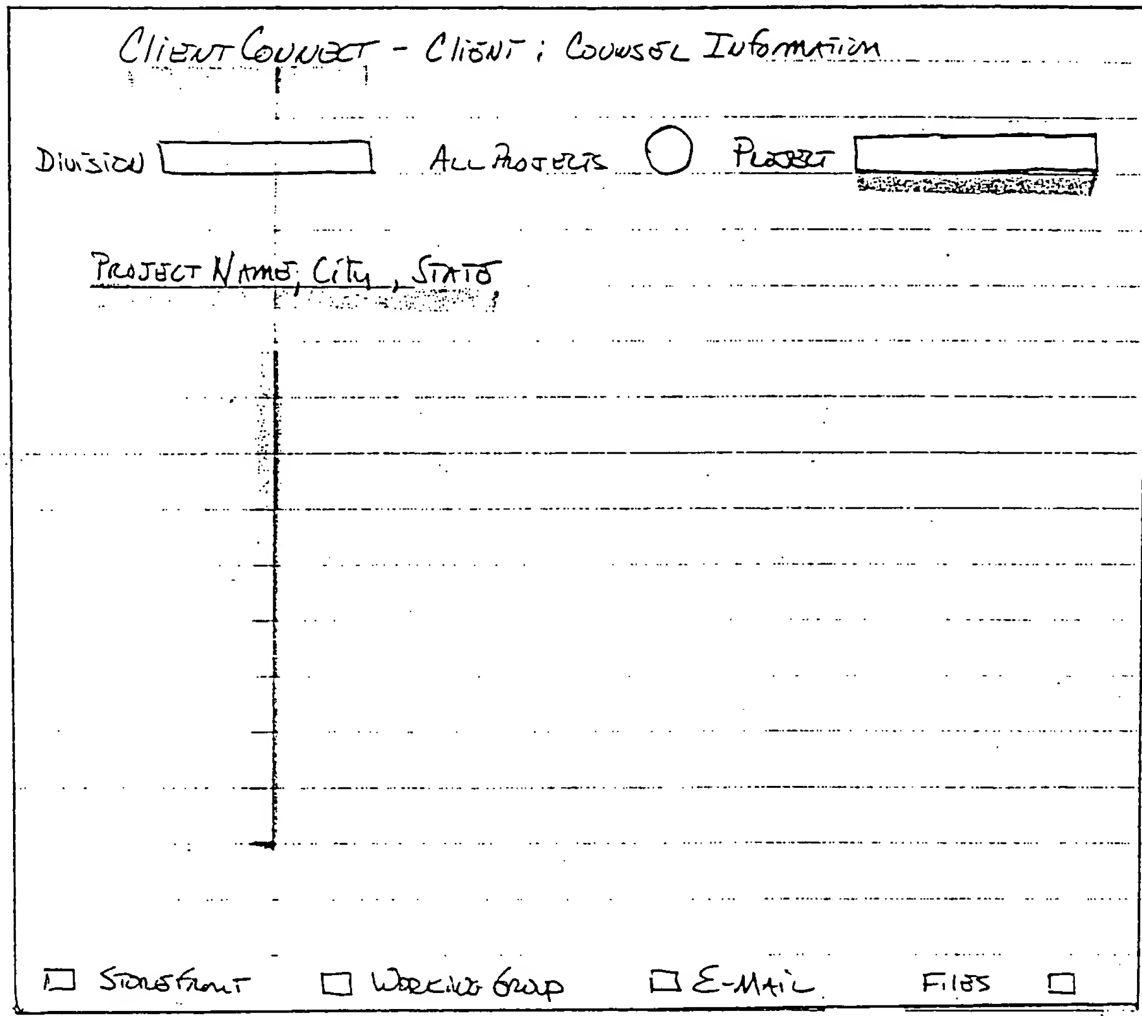
- Explore WP Highlighting tools

Consider; Letters Memos

Input: Counsel/Counsel staff

Links: to specific document

Relationship: Links only



Consider "Issues"

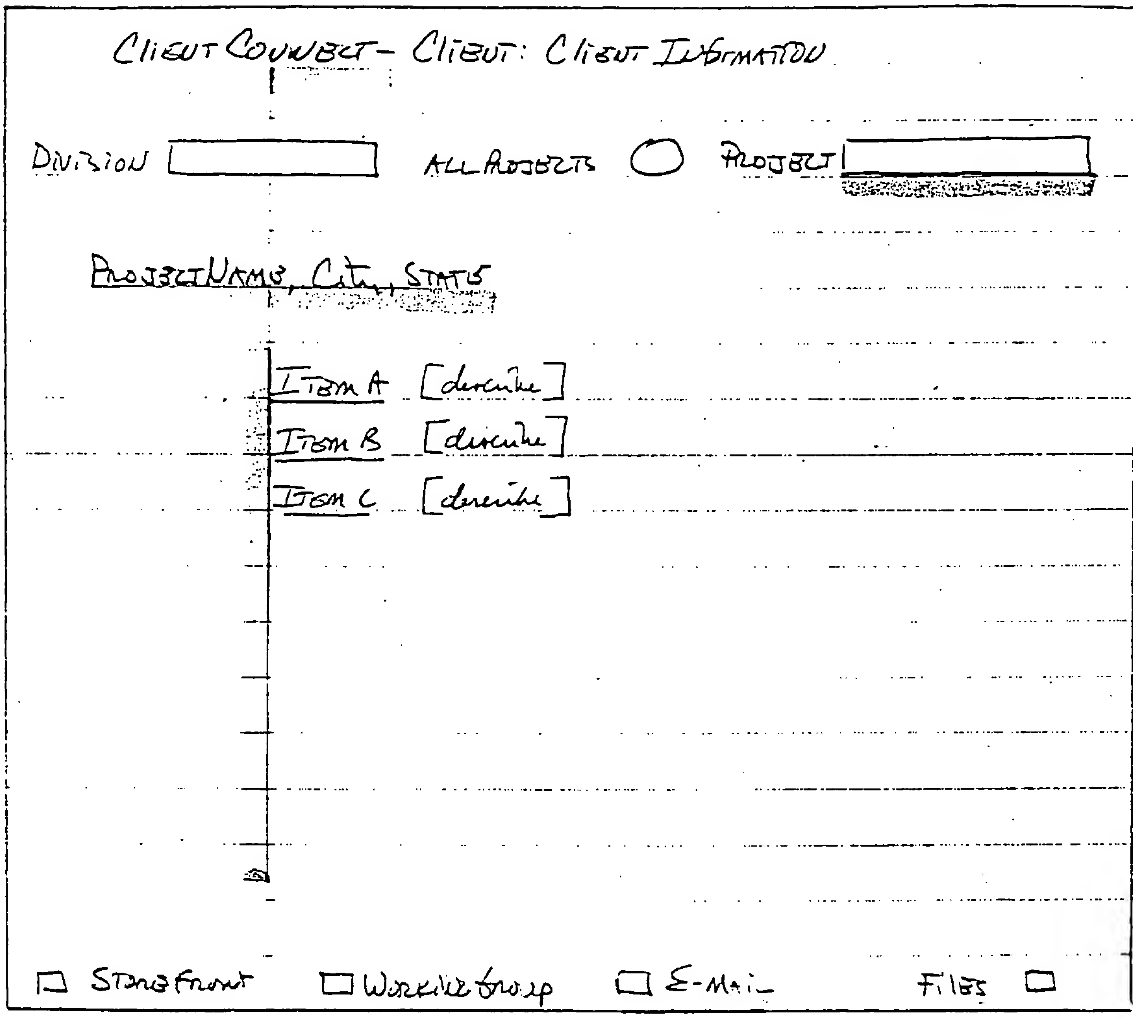
Purpose: Counsel generated info
highlight where applicable using Acrobat / RE:MARX - 2WAY
Share among working group

Candidates:
- Drafts / Markups
- Title Commitment
- Survey
- Title Policy
- Due Diligence Info

Input: Counsel / Counsel Staff

Links: to specific item or document

Relationship: Links only



See – Customer "Issues"

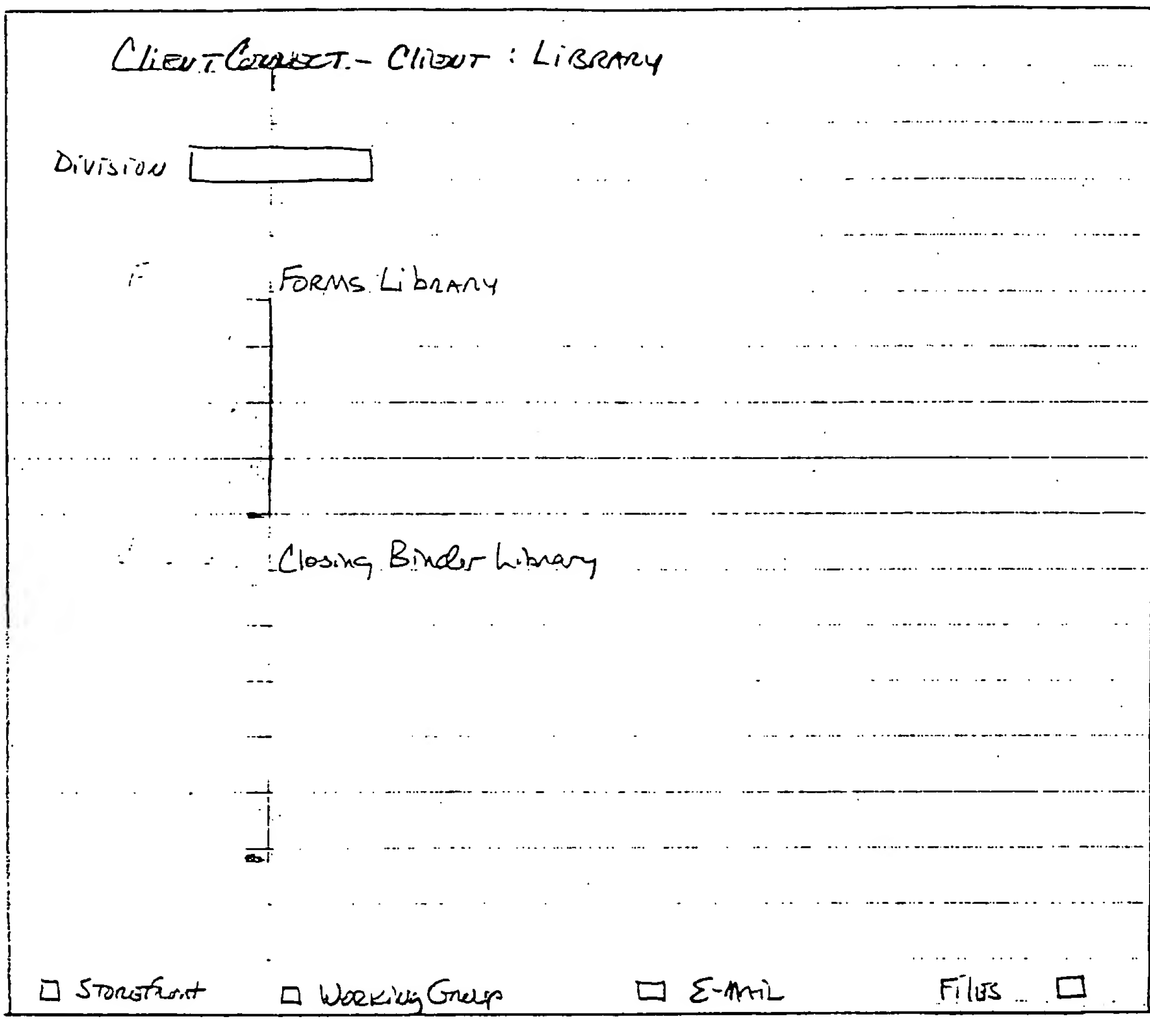
Purpose: Client Generated info
Highlight where applicable using Acrobat/Re Mark – 2 WAY
Share among working group

Candidates:
- Working Groups
- Client Checklists
- Other

Input: Client / Client Staff

Links: To specific Item or Document

Relationships: Links only



Key = Links to specific form / binder

For Use When Adding New Project for an Existing Client

NEW PROJECT WIZARD

Key: Must be Able to Update During Transaction

	Field Name	Data Input
• Provide Name of Project	Project	Type name
• Provide Name of Project, City and State	Project Name, City, and State	Type name of project, city and state
• Add any new "Responsibility" names for Client / Counsel	Responsibility	Type new names e.g., A - new HB - new
• Add any new "Discussion" names for Client / Counsel	Discuss	Type new names e.g., A - new HB - new
• Add any new "Approved" names for Client / Counsel	Approved	Type new names e.g., A - new HB - new
• Add any new "Action Parties" for Client / Counsel	Action Parties	Type new names e.g., A - new HB - new
• Working Group Additions: Complete WG form for each new Working Group member		
• E-mail		

Password aspects

DATA INPUT WIZARD

RP - can all [redacted] DATA BE INPUTED IN SPECIFIC VIEW

eg:

- STATUS
- Issues
- Critical Dates
- Checklists
- Action
- WORKING GROUPS

PASSWORD WIZARD

KEY = DEFINE PASSWORD ACCESS capabilities / limitations

NEW CLIENT WIZARD

	Field Name	Data Input
	Heading	Type name
• Does Client have different divisions that would use Client Connect? Select ○ Y ○ N		
• If Yes, then complete by listing divisions [If No, then delete "Divisions" box]	Divisions	Type name(s) of divisions
Will Client Connect be used for this new client for a single ~~simple~~ project or multiple projects? Select ○ S ○ M [If "S", then delete "All Projects" box]		
- Complete name(s) of projects	Project	Type name(s) of projects

• Select applicable components

- ○ Transaction Management
  - ○ Status
  - ○ Issues
  - ○ Critical Dates
  - ○ Checklists
  - ○ Action
  - ○ Working Group
- ○ Document Management
- ○ Counsel Information
- ○ Client Information
- ○ Library

If selected "Transaction Management" components, then select applicable Transaction Management Reports

- o Project Report
- o Status Report
- o Flag Report
- o Issues Report
- o Critical Dates Report
- o Checklist Report
- o Action Report
- o Responsibility Report
- o Discussion Report
- o Custom Reports

- Passwords -- discuss with Melson ☆

- Should "Issues" be broken down into 2 or more categories?

  Select o Y o N

  - If Yes, then list categories of "Issues"

	Issues Categories	Type issues categories (e.g., Input/ Initial Drafting Issues; Local Counsel Issues; Sale Agreement Issues)

- Select "Responsibility" parties can be multiple

  - o Client
  - o Counsel
  - o Local counsel
  - o Purchaser
  - o Purchaser's Counsel
  - o Seller
  - o Seller's Counsel
  - o Lessor
  - o Lessor's Counsel
  - o Lessee
  - o Lessee's Counsel
  - o Broker
  - o Title Company
  - o Escrow Agent
  - o Lender
  - o Borrower
  - o Surveyor

• For "Client" and "Counsel"	Responsibility	For Client, type first letter or two of Client's name, then hyphen, then last name for each e.g., A -- Huff A -- Barger) For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each e.g., HB - Jenkins HB - Raines
• For "Discussion", please list persons within "Client" and "Counsel" to whom "Discussion" may be assigned	Discussion	For Client, type first letter or two of Client's name, then hyphen, then last name for each e.g., A - Huff A - Barger For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each e.g., HB - Jenkins HB - Raines
• For "Approved", please list persons within "Client" and "Counsel" to whom "Approved" may be assigned	Approved	For Client, type first letter or two of Client's name, then hyphen, then last name for each e.g., A - Huff A - Barger For Counsel, type first letter or two of Counsel's name, then hyphen, then last name for each e.g., HB - Jenkins HB - Raines

ADD Lit of Duties List

Checklists

Action

Working Group

To Do's

- Templates for Project
  - Issues Categories
  - Critical Dates
  - Checklists

- Wizards -
  - New Client
  - New Project
  - Passwords
  - Data Input